

Daily Market Wrap

- **Market Indicators:** The equities market closed on a mixed note, with NASI declining 0.51% to 170.34, NSE 10 easing 0.61% to 1,737.49, and the Banking Index falling 0.86% to 164.16. However, the NSE 20 and NSE 25 indices edged up 0.14% and 0.18% to 2,939.16 and 4,572.87 respectively. Market capitalization slipped to Kes. 2,683.74Bn, while equities turnover rose slightly by 0.16% to Kes. 308.54Mn.
- **Gainers/Losers:** BK Group led the gainers with a rise of 8.44%, followed by NCBA Group at 8.27% and Sanlam Kenya at 8.25%. On the losing side, Williamson Tea dropped sharply by 21.19%, Shri Krishna Overseas declined 9.29%, while Centum fell 7.31%.
- **Top Movers:** Safaricom remained the most traded counter with Kes. 66.06Mn, followed by Kenya Power at Kes. 49.46Mn and KenGen at Kes. 46.50Mn.
- **Foreign Participation:** Foreign investors were net sellers, with major outflows from Safaricom at Kes. 20.09Mn, Absa NewGold ETF at Kes. 9.58Mn, and Stanbic Holdings at Kes. 6.55Mn. Inflows were led by KCB Group at Kes. 35.29Mn, Equity Group at Kes. 9.74Mn, and Kenya Power at Kes. 2.80Mn.
- **Bonds Market:** Activity in the secondary bonds market strengthened significantly, with turnover surging 96.76% to Kes. 10.95Bn from Kes. 5.56Bn in the previous session, reflecting renewed investor appetite for fixed-income securities.

Corporate Actions:

- **Absa Bank (K) Plc:** Interim dividend Kes. 0.20/share; books closed 19-Sep-25; payment 15-Oct-25
- **EABL Plc:** Final dividend Kes. 5.50/share; books closed 16-Sep-25; payment 28-Oct-25

Market Activity Summary Tables

Market Indicators			
Indicator	Previous day	Current day	%Change
NASI	171.21	170.34	-0.51%
NSE 10	1748.08	1737.49	-0.61%
NSE 20	2935.11	2939.16	0.14%
NSE 25	4564.51	4572.87	0.18%
Bank Index	165.59	164.16	-0.86%
Market Capitalisation (Bn)	2697.36	2683.74	-0.50%
Total Shares Traded (Mn)	20.41	20.15	-1.27%
Total Equities Turnover (Mn)	308.06	308.54	0.16%
Bond Turnover (Bn)	5.56	10.95	96.94%

Top Movers			
Stock	Share Price 13-Oct	Share Price 14-Oct	Mkt Turnover (Kes. Mn)
Safaricom	26.60	26.00	66.06
Kenya Power	13.05	12.90	49.46
KenGen	9.06	9.10	46.50
KCB Group	57.25	57.50	44.26
NCBA Group	69.50	75.25	25.70

Top Gainers			
Stock	Share Price 13-Oct	Share Price 14-Oct	%Change
BK Group	38.50	41.75	8.44%
NCBA Group	69.50	75.25	8.27%
Sanlam Kenya	8.24	8.92	8.25%
Carbacid Inv.	25.40	26.45	4.13%
Standard Group	6.04	6.26	3.64%

Top Losers			
Stock	Share Price 13-Oct	Share Price 14-Oct	%Change
Williamson Tea Kenya	302.00	238.00	-21.19%
Shri Krishna Overseas	8.18	7.42	-9.29%
Centum	15.05	13.95	-7.31%
Absa NewGold ETF	5310.00	5050.00	-4.90%
CIC Insurance	4.68	4.48	-4.27%

Top Foreign Buys		
Stock	Share Price 14-Oct	Foreign Buys (Kes. Mn)
KCB Group	57.50	35.29
Safaricom	26.00	19.15
Equity Group	59.00	9.74
Kenya Power Ord.	12.90	6.35
KenGen	9.10	0.18

Top Foreign Sells		
Stock	Share Price 14-Oct	Foreign Sells (Kes. Mn)
Safaricom	26.00	39.24
Absa NewGold ETF	5050.00	9.59
Stanbic Holdings	199.00	6.55
Kenya Power Ord.	12.90	3.55
Kenya Airways	3.89	1.65

Top Foreign Net Inflows		
Stock	Share Price 14-Oct	Net inflows (Kes. Mn)
KCB Group	57.50	35.29
Equity Group	59.00	9.74
Kenya Power	12.90	2.80
KenGen	9.10	0.18
Kenya Re	3.01	0.15

Top Foreign Net Outflows		
Stock	Share Price 14-Oct	Net Outflows (Kes. Mn)
Safaricom	26.00	-20.09
Absa NewGold ETF	5050.00	-9.58
Stanbic Holdings	199.00	-6.55
Kenya Airways	3.89	-1.65
Car & General (K)	52.25	-0.78

MARKET SUMMARY

Stock	Share Price 13-Oct	Share Price 14-Oct	%Change	YTD %Change	Mkt Turnover (Kes. Mn)	Dividend Yield
AGRICULTURAL						
Eaagads	20.85	20.70	-0.72%	72.50%	0.01	-
Kakuzi Plc	401.50	401.50	0.00%	2.29%	0.00	1.99%
Kapchorua Tea	394.25	394.25	0.00%	64.79%	0.03	6.34%
Limuru Tea	376.75	376.75	0.00%	7.64%	0.00	-
Sasini Plc	18.05	18.45	2.22%	23.00%	0.01	5.42%
Williamson Tea Kenya	302.00	238.00	-21.19%	5.90%	0.16	10.50%

AUTOMOBILES & ACCESSORIES

Car & General (K)	51.75	52.25	0.97%	109.00%	1.13	1.53%
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BANKING

ABSA Bank Kenya	21.75	21.85	0.46%	15.92%	4.70	8.01%
BK Group	38.50	41.75	8.44%	19.29%	1.89	6.28%
DTB Group	100.50	100.50	0.00%	50.56%	2.56	6.97%
Equity Group	59.25	59.00	-0.42%	22.92%	13.69	7.20%
HF Group	10.40	10.65	2.40%	131.52%	2.22	-
I&M Group	42.05	42.25	0.48%	17.36%	0.78	7.10%
KCB Group	57.25	57.50	0.44%	35.61%	44.26	5.22%
NCBA Group	69.50	75.25	8.27%	47.55%	25.70	7.31%
Stanbic Holdings	198.50	199.00	0.25%	42.40%	10.40	10.42%
Stan Chart Bank	282.00	282.25	0.09%	-1.05%	3.64	13.11%
Co-op Bank Group	19.95	19.70	-1.25%	12.89%	2.63	7.61%

COMMERCIAL AND SERVICES

Deacons East Africa	0.45	0.45	0.00%	0.00%	0.00	-
Eveready East Africa	1.34	1.36	1.49%	16.24%	0.04	-
Express Kenya	7.36	7.38	0.27%	105.00%	0.01	-
Homeboyz Entertainment Plc	4.66	4.66	0.00%	0.00%	0.00	-
Kenya Airways	3.93	3.89	-1.02%	1.57%	3.06	-
Longhorn Publishers Plc	3.00	3.00	0.00%	30.43%	0.01	-
Nairobi Business Ventures	1.62	1.63	0.62%	-18.91%	0.09	-
Nation Media Group	13.25	13.30	0.38%	-7.64%	0.01	-
Sameer Africa	14.10	13.55	-3.90%	455.33%	0.12	-
Standard Group	6.04	6.26	3.64%	25.45%	0.01	-
TPS Eastern Africa	15.90	16.00	0.63%	0.95%	0.05	2.19%
Uchumi Supermarket	0.39	0.39	0.00%	143.75%	0.04	-
WPP Scangroup	2.91	2.81	-3.44%	11.95%	0.17	-

CONSTRUCTION & ALLIED

Athi River Mining	5.55	5.55	0.00%	0.00%	0.00	-
Bamburi Cement	54.00	54.00	0.00%	-1.82%	0.00	-
Crown Paints Kenya	58.00	56.50	-2.59%	66.67%	0.02	5.31%
E.A.Cables	1.71	1.71	0.00%	61.32%	0.00	-
E.A.Portland Cement	56.25	57.50	2.22%	97.93%	0.04	1.74%

ENERGY & PETROLEUM

KenGen	9.06	9.10	0.44%	142.67%	46.50	7.14%
Kenya Power Ord.	13.05	12.90	-1.15%	149.03%	49.46	5.43%
Kenya Power Pref 4	4.51	4.51	0.00%	0.00%	0.00	-
Kenya Power Pref 7	6.00	6.00	0.00%	0.00%	0.00	-
Total Energies Kenya	35.00	34.90	-0.29%	71.50%	0.58	5.50%
Umeme Ltd	8.26	8.50	2.91%	-49.10%	0.63	-

INSURANCE

Britam Plc	8.46	8.46	0.00%	45.36%	0.17	-
CIC Insurance	4.68	4.48	-4.27%	109.35%	2.01	2.90%
Jubilee Holdings	314.75	320.75	1.91%	83.55%	0.68	4.21%
Kenya Re	3.02	3.01	-0.33%	122.96%	12.15	9.97%
Liberty Kenya	10.90	11.00	0.92%	64.18%	1.33	14.55%
Sanlam Kenya	8.24	8.92	8.25%	80.20%	0.06	-

INVESTMENT

Centum	15.05	13.95	-7.31%	36.76%	0.73	2.29%
Home Afrika	1.22	1.20	-1.64%	224.32%	0.72	-
Kurwitu Ventures	1500.00	1500.00	0.00%	0.00%	0.00	-
Olympia Capital Holdings	6.78	6.80	0.29%	141.99%	0.07	-
Trans-Century	1.12	1.12	0.00%	180.00%	0.00	-

INVESTMENT SERVICES

NSE	15.00	14.75	-1.67%	150.00%	0.96	-
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MANUFACTURING & ALLIED

BOC Kenya	128.25	126.75	-1.17%	42.82%	0.02	6.82%
BAT Kenya	432.50	431.75	-0.17%	14.75%	7.37	11.58%
Carbacid Investments	25.40	26.45	4.13%	29.98%	0.60	6.43%
EABL	214.75	214.25	-0.23%	22.08%	0.83	3.73%
Flame Tree Group	1.61	1.58	-1.86%	64.58%	0.06	-
Kenya Orchards	65.00	65.00	0.00%	-7.14%	0.00	-
Mumias Sugar Co.	0.27	0.27	0.00%	0.00%	0.00	-
Unga Group	25.50	24.85	-2.55%	65.67%	0.04	-
Shri Krishna Overseas	8.18	7.42	-9.29%	25.34%	0.03	-

TELECOMMUNICATION

Safaricom	26.60	26.00	-2.26%	51.16%	66.06	4.62%
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REITs

LapTrust Imara I-REIT	20.00	20.00	0.00%	0.00%	0.00	4.10%
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EXCHANGE TRADED FUNDS

Absa NewGold ETF	5310.00	5050.00	-4.90%	58.81%	10.19	-
Satrix MSCI World F. ETF	831.00	828.00	-0.36%	8.80%	0.36	-

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